



HOMEWORK ACTION PLAN

S SPECIFIC
 M MEASURABLE
 A ACHIEVABLE
 R RELEVANT
 T TIME-BOUND

Name <u>Neil Hemphill</u>	Class # <u>N378</u>
Dealership <u>Crown Motors</u>	Date <u>9/24/2021</u>

Current Situation or Challenge to be Addressed:	Disconnect between sales and service related to customers information ie... customer concerns, past customer experiences, customer preferences, we owes, future service credits....		
Current Performance Level (include specific measure):	Currently sales are using the Dealer Socket CRM and service is tracking customer feed back and note in the DMS and spread sheets		
Goal (what do you want to achieve?)	Log all customer notes into one accessible central system		
Goal Performance Level (include specific measure)	Track and monitor CRM usage report. Currently zero service employee log into CRM. Goal is to have customer relations manager log in daily to update customer feed back from follow up calls and make CRM accessible to all customer facing employees		
Goal Start Date:	9/1/2021	Goal End Date:	12/1/2021
First Check-in Date:	9/1/2021	Performance Objective:	Pitch idea and get buy in from CR manager and Sales manager. Create logins for service staff
Second Check-in Date:	10/1/2021	Performance Objective:	Complete training with CR manager
Third Check-in Date:	11/1/2021	Performance Objective:	Complete training with lead service advisor, monitor CRM usage from CR manager
Fourth Check-in Date:	12/1/2021	Performance Objective:	CRM training completed and all customer facing employees are successfully

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			using CRM
How does your goal align with the dealers' vision?	Completing this goal will give the customer a better experience and improve communication between departments		
What are the potential benefits of achieving your goal?	better experience and improve communication between departments		
What are the potential consequences if you don't achieve your goal?	Service team missing details about car deal, customer loyalty, or services owed to customer. Sales not being aware of previous service issues		
Why is the goal important to you?	Removing barriers between departments		
Potential Obstacles	Team buy in, technology limitations, getting accurate information, system log ins		
Potential Solutions	Proper training on system, enough CRM log ins for each team member		
BOTTOM LINE! Financial Impact of Achieving Your Goal (expressed in dollars)	Every lost customer is a loss of \$1,000,000 in future business		

What specific actions or steps will you take to accomplish your goal? What will you do differently or improve? For each, be sure to include necessary resources, who is accountable, the measurable result, and dates.

SPECIFIC ACTION/STEP	NECESSARY RESOURCE(S)	ACCOUNTABLE PERSON(S)	EXPECTED RESULT	START, END, & CHECKPOINT DATES
Log in for Service Manager and CR Manager	CRM log in	IT Manager	Access to CRM	September 1 complete
Training for Service Manager	GSM to perform	GSM	Working knowlage	Start September 1 Complete

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and CR Manager	training		of CRM	Septemebr 30
Log in for Lead service advisor	CRM log in	IT Manager	Access to CRM	October 1 complete
Training for Lead Advisor	GSM perform training	GSM	Working knowlge of CRM	Start October 1 Complete October 31
Log ins for Team leaders and additional Service Advisors	CRM log ins	Service Manager	Access to CRM	November 1 Complete
Perform Training for Team Leaders and additional Advisors	Service Manager to perform training	Service Manager	Working knowlage of CRM	Start November 1 complete November 30
Monition results	Sales/Service CSI survey scores	GSM, Service Manager, CR Manager	Interdepartmental communication and increased customer satisfaction	December 1

As you work toward your goal, it’s important to have interim check points with specific, measurable objectives so your team can hold themselves accountable. If everyone knows the goal and objectives, you don’t have to spend your valuable time micromanaging.

Once you’ve accomplished your goal, added or adjusted policies, procedures, and behaviors, now what? How will you ensure you and your staff do not fall back into the previous habits that produced poor results? Be specific.

CSI scores for Sales and Service, use only CRM for customer notes, Shut off note function in DMS, Monitor/report CRM usage

Describe any planning or implementation meetings conducted as part of development of your plan.

Feedback, results, and success stories will be discussed during technician, Advisor, and Sales meetings



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Sponsor Signature: _____